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State of the Art Fair Post-Covid: Audience Development Strategies in a Post-Digital Context

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ABSTRACT

This paper presents an overview of the audience-oriented initiatives implemented by art fairs during the confinement. As in other spheres of art and culture, significant growth of digital activities has been offered to the audience of the fairs. However, due to the 'experience nature' of the event, not all of these strategies were equally successful. Based on the qualitative thematic analysis of the articles written by the representatives of the art world, this paper identifies audience development strategies for the art fairs in a post-digital context. The first section introduces the classification of the strategic areas of audience development covered by the art fairs during confinement. The second section discusses which of these strategies can be implemented in the post-pandemic context. In conclusion, an overview of the audience development strategies and main trends is presented, opening the discussion on the contribution of these strategies to the development of the new art fair's model.

Keywords:

Art Fairs

Audience
Development

Glocalization

Post-Covid

Post-Digital

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Introduction

Cultural events are one of the most important tools for social development and engagement. At the beginning of 2020, due to the spread of Covid-19 and all the consequences that followed, the cultural sphere became one of the most seriously damaged. It can be specially noted on the venue and events-based activities, that had to search for new ways of engagement with their audience (OECD, 2020: 13; Council of Europe, 2020: 4).

Art fairs, typically held in big exhibition venues, gathering thousands of visitors and participants, was one of the industries that had to rapidly adapt to the new circumstances. On account of the cancellation of the most important art fairs in 2020 (The Art Market Report 2021: 174), the future of these events became one of the most discussed topics in the art market.

Not only the art fairs play a key role in the contemporary art market, presenting the most commercially promising artworks, selected by art dealers and sometimes curators (Vermeulen, F., 2020; Stocco, D., 2019; Baia, C. S., 2012) and stimulating competitiveness among the collectors, who want to be the first ones to purchase new artworks (Thornton, 2008), they also provide networking opportunities, increasing visibility and building a reputation of both artists and the galleries (Kapferer, 2010; Morgner, 2014; Yogeve, 2010; Yogeve and Grund, 2012). Besides that, art fairs facilitate discussions by organized conferences and panel talks; collaborate with museums and private art foundations, thus they cannot be approached only as commercial events. Changes in their usual routine have undoubtedly affected other artistic spheres and actors: galleries, artists, art collectors.

During the confinement, art fairs' organizers had to develop creative solutions to stay connected with their audience and provide visibility to the galleries. Reinventing their usual forms of organization, they were testing diverse strategies, developing digital tools, organizing de-centralized smaller events, or promoting international cooperation with galleries and public spaces.

It is important to add, that the need to change the existing art fair's model has been widely discussed even before the pandemic (Baldacci, Ricci, & Vettese, 2020;

Barragan, 2020; Saltz, 2018), but this issue became even more urgent in the post-pandemic post-digital context. Although lately several studies focused on development, networking and the general role of the art fairs have been published (Baldacci, Ricci, & Vettese, 2020; Barragan, 2020; Vermeulen, 2020; Stocco, 2019; Baia Curioni & Garutti, 2014), far too little attention has been paid to the role of the audience and audience development strategies.

Based on the qualitative thematic analysis, this paper aims to provide a comprehensive overview of the most widespread audience-oriented activities implemented during the confinement and to identify which of them can be possibly used in the post-pandemic future, contributing to the development of the new art fair's model¹.

Theoretical Framework

Place of the Art Fairs in the Art World

According to Howard Becker (1982), the art world represents a complex network of people that includes everyone involved in producing, commissioning, presenting, preserving, promoting, chronicling, criticizing, buying, and selling fine art. This idea is supported by Sarah Thornton (2008), noting that overlapping subcultures of the art world can be held together only by a belief in art. Although the presentation of the art fair as an important actor of the art world is not new (Morel, 2013: 355; Smith, 2020: 25), it seems impossible not to consider it, researching the fairs. It is crucial to understand the phenomenon of the art fair as an important tool for the presentation, promotion, and distribution of art and to consider it only in interaction with other participants of this big network. In this regard, all the actors involved in the art fair, including art fairs' organizers, curators, artists, art dealers, art critics, and collectors are the participants of the same network, playing their roles by contributing to the art world's dynamics. However, speaking about such a big public event as the art fair, it shouldn't be forgotten that among the visiting audience, there are also ordinary visitors who are coming to see the art fair as a leisure activity or touristic experience and they don't share the same degree of knowledge and

¹ Present paper has been elaborated as a part of the doctoral thesis, on which the author is working at the moment. The main goal of the thesis is to find socially-oriented audience development strategies for the emerging art fairs in Spain and Italy. Starting the research during this unusual historical moment, it is important to take into consideration initiatives and creative solutions implemented by the art fairs' organizers in the given context, because they will likely shape the changes in the future model of the art fairs in the post-digital times. Preliminary findings of this research have been presented online during the 15th Max Weber Fellows' June Conference "Healing and Renewal", organized by the Max Weber Programme, and held on 16, 17, and 18 June 2021.

familiarity with the art world or, in a broader sense with the art field, as it was theorized by Bourdieu (1993).

Being responsible for the distribution of the art, at the same time, art fairs represent an important meeting point for various actors of the art world. (Yogev & Grund, 2012: 27). Accordingly, they are the key events in the market, as they serve as the unmissable society events (Vermeulen, 2015: 56) and provide significant networking opportunities to their participants (Ruiz, 2021; Morgner, 2014; Yogev & Grund, 2012; Yogev, 2010).

According to Catherine Morel (2014), art fairs can be perceived as the real metaphor of the art world. She suggests studying them from different perspectives: as a field configuring event; in comparison with other creative industries; as gatekeeper to the art world; as a map of the art world; as a site for re-enactment of the art world; and as a place for selected encounters; concluding that as "cyclical events that concentrate important actors of the art world in specific locations, art fairs go far beyond commercial transactions: they facilitate and support knowledge exchanges, network and reputation building" (Morel, 2014: 360).

Art dealer and author Nacho Ruiz (2021: 25) went further, suggesting placing art fairs in one of the central places within the concept of the art system, originally coined by Lawrence Alloway and Achille Bonito Oliva in 1972. Additionally, speaking about art as a social and perceptual system, it is important to mention major work by Luhmann (1971: 13), who claimed that art was a special kind of communication that used perceptions instead of language, which should be considered regarding the representative function of the art fairs.

Art Fairs in the Pre-Covid Context

Although various predecessors of the art fairs in the shape of art festivals, fairs of artisanship, or biennials (Barragan, 2008) have been witnessed throughout history, the model of the art fair closest to its contemporary shape has been first held only in 1967 in Cologne (Morgner, 2014). Planned as a place of gathering and exchange for dealers, collectors, artists, and art enthusiasts, today this exhibition-based event has grown into an international phenomenon.

Although some of the fairs claim that their mission is to "bring art closer to the audience" (Art Cologne) or "to discover new talents, on one side, and to support the rediscovery of the overlooked ones on the other" (Artissima), the fact that they provide an enormous commercial potential is clear and shouldn't be forgotten. According to Mehring (2008), during its most

productive years, Art Cologne was largely responsible for "generating the most public and open discussion about the contemporary art market in history" (p.328). Thompson (2011), named the art fairs "tournaments of value" (p. 71) in the art market; Heiser (2020) went further, claiming that art fairs are "market events" and that they are "like bazaar" (p.125), emphasizing that even the seemingly non-commercial parts such as talks or educational programs serve to a purpose of brand-building, as a part of the overall business.

The success of the art fairs can be traced to the growth of art fairs' amount worldwide. According to Thompson (2008), the number of established art fairs had risen from 55 in 2001 to 205 in 2008. Since then, the significance of the fairs has been gradually increasing: the 2020 Art Basel & UBS Art Market Report includes 300 established international art fairs in 2019. Due to the growing interest in the art fairs' phenomenon, the current era has been even described as "the age of the art fair" (Barragan, 2008, Bankowsky, 2005), "the decade of the art fairs" (Thompson, 2008) and the "artfairisation" of the art world (Barragan, 2008).

Assessment of the art fairs in the period right before the pandemic (UBS Art Market Report 2020) proved that they remained a key method for galleries to reach a higher volume of new clients from local and international markets. It has also revealed high interest shared between groups of visitors. Although only a small part of them turns into real clients, according to participating galleries and art fair organizers, these events serve as a starting point for education and familiarization of new collectors with galleries, artists, and the art market.

Despite the increasing number of attendees as well as growing public engagement, in the last decade, there could be noticed a tendency to complain about the oversaturation with the art events (Micheala Neumeister cited in Thompson, 2011: 45). Tiredness from the need to attend numerous art fairs, excessive traveling, and the urge to attend a variety of side events during the art fair's week, became such a common topic, that they even coined a special term for it: *Fairtigue* (Schneider, 2018; Heiser, 2020). It was widespread in 2019, together with similar comments on the fact that there were "too many fairs", and "overload" with the art events (Adam, April 1, 2020).

The tendency of *fairtigue* and cancellation of the art fairs, as well as some other organizational and ethical problems, have raised a debate on the efficiency of the existing art fair's model. In his major research on the history and development of the art fairs, Paco Barragan

(2020) claims that the present moment is a perfect time to reshape the existing art fair's model. He believes that methods and strategies working during the booming economy may not work at present and that now the art fairs need more practical/financial changes rather than theoretical/curatorial ones.

The fact that from a trade show with cultural impact (Frost, W., & Laing, J., 2018), art fairs have transferred into real experiences raised another debate among the researchers. Based on the notion of the "experience economy", first introduced in a 1998 article by B. Joseph Pine II and James H., Barragan (2008: 67) suggests that art fairs represent a paradigm of that experience economy: a center where a limited offer of artworks on sale allows to transcend from the category of simple "spectator" into a "role-player", a real participant of the art world. He then adds that art fairs are praised not only for the quality of the art displayed but also for the quality of the "experience they offer" (p. 88). Moreover, according to Velthuis (2012: 32), within this event culture, the whole concept of consumption of contemporary art is represented as a social and cultural experience.

Although the main goal of the organization of "experimental" and non-commercial events (Ricci, 2020: 66), including artists' talks, lectures, workshops, bookshops, and additional curated exhibitions (Smith, 2020; Altshuler, 2020), may be questionable, after all, they offer a diverse cultural program to the public. For instance, as a part of the VIP Program, art fairs are organising presentations and breakfasts in the galleries, visits to the collectors' houses, cocktails, and parties in museums (Dalley, 2013). Therefore, for the experienced collectors, who have a personal invitation from the Art Fair or participating gallery and are included in the VIP Program, the idea of attending an art fair includes the whole experience package. Unfortunately, it is not the case for the visitors who come to the art fair for the first time or attend it "by surprise" (Bollo et al., 2018). They may be confused by the chaotic structure of the Art Fair, and not informed of any side events happening around the city during the fair, although some of them are free to attend and don't require a special invitation.

In this regard, it is interesting to distinguish the types of audience typically attending the art fairs. At first glance, it may seem that, as an industry event, it is aimed exclusively at the people from the art industry: "galleries, collectors, curators, museums' directors, art critics, journalists..." (Yogev and Grund, 2012). Some of the fairs even list the "desired" categories of visitors. For instance, Art Cologne invites "museums (directors,

curators), collectors (institutional, investment and private), auction houses, cultural and educational services, artists, art curators and art consultants, banks and insurance, companies, architects, private people interested in art" (Art Cologne website: For Visitors). However, the latter group "private people interested in art" remains unclear, and raises many questions. An interesting reflection on it was made by Schultheis et al. (2015): doing major ethnographical research on the Art Basel, they suggested the division between customers, who can be called "art lovers", and general visitors, who can be called "interested in art" (p.16). This division can be noticed starting from an allocation of the special days of the art fairs dedicated to Professionals or VIP guests only (by invitation/accreditation only) and the general public (free or paid entrance during the last days of the fair, usually on weekend). Thus, typically during the first two-four days, art fairs are open exclusively to a selected group of people, and "general audience" or people "interested in art" can come only on the last days of the fair. Therefore, talking about the audience development of the art fairs, this functional distinctions should be taken into account.

Art Fairs and Audience Development

As a starting point, it should be stated that audience development is not a scientific discipline, but rather a management approach within cultural institutions. There are several definitions of this term, shaped in different countries based on their specific contexts (Cuenca-Amigo & Makua, 2018).

However, most of these definitions agree on the *transversality* of the Audience Development (Cuenca-Amigo, & Makua, 2018). Starting from the first research and discussions on the subject, Rogers (1998) argued that audience development was the result of the combination and collaboration of programming, education, and marketing, wondering if the professionals from such different fields would ever be able to work together towards the common goal of developing audiences. Supporting this idea Kotler and Scheff (2004) highlight the complications connected to collaboration between art directors and employees from the administrative departments, including marketing.

Although it was created ten years ago, a comprehensive definition of Audience Development from the Arts Council of England (2011: 2) is still widely used: "activity which is undertaken specifically to meet the needs of existing and potential audiences

and to help arts organizations to develop ongoing relationships with audiences. It can include aspects of marketing, commissioning, programming, education, customer care, and distribution". This definition then emphasizes the importance of AD, concluding that: "As an ethos audience development places the audience at the heart of everything the organization does". Colomer (2013), who instead of using this term refers to it as *audience training*, also highlights the idea of confluence of different areas, stating that audience training is multidisciplinary and that various disciplines converge in it such as marketing, sociology, economics, pedagogy or social dynamization, which just confirms the idea of the importance of the comprehensive collaboration.

However, in the case of this study, the social aspect of Audience Development, focused on accessibility, inclusivity, and education is more relevant. The most illustrative for it is the definition given by the European Commission (2012: 1): "Audience development is a strategic, dynamic, and interactive process of making the arts widely accessible. It aims at engaging individuals and communities in experiencing, enjoying, participating in and valuing the arts through various means available today for cultural operators, from digital tools to volunteering, from co-creation to partnerships".

Additional findings can be encountered in a study conducted by Bollo et al., (2017). It is mainly focused on the organizational part, proposing eight strategic areas of intervention: programming, audience participation, and co-creation, digital transformation, use of data, place, collaboration and partnership, organizational change, capacity building.

Besides that, at present, several cultural organizations start to take into account local communities of their interest. Regarding this, Borwick (2012) delves into the relationship of cultural organizations with their local communities and defends the need to focus on creating communities instead of audiences in the first place. The term strictly associated with this practice is then *community engagement*.

Post-Digital Context

In the introduction to his forthcoming book *Shout for Joy! The Plague has Passed: Biblical Insights for Life in a Post-corona Era*, artist, and art educator Mel Alexenberg claims that "the Post-corona Era is a Postdigital Age". The term explains a wide dependence on the process of digitalization and refers to: "technical

condition that followed the so-called digital revolution and is constituted by the naturalization of pervasive and connected computing processes and outcomes in everyday life, such that digitality is now inextricable from the way we live while forms, functions, and effects are no longer perceptible" (Albrecht, Fielitz & Thurston, 2019:11).

The first discussion on the related topic can be found in the article written by Nicholas Negroponte back in 1998. The main idea behind it was that oversaturation with digital techniques and experience may bring surprising changes to the rest of culture and society in general. Thus, speaking about post-digitalization, the focus should be made not only on the technical side of the process, but also on the social, cultural, and political effects of this normalization.

Interestingly, the term is widely used in connection to artistic practices (Alexenberg, 2011; Benayoun, 2008; Bolognini, 2008), referring to the focus on "being human, rather than with being digital" (Alexenberg, 2011:14). It is concerned with constantly changing relationships between digital technologies and art forms. However, it does not mean that the digital part will disappear or will not be needed anymore. On the contrary, digital transformation will continue its way to produce innovative approaches and experiences. At the same time, the importance of social interaction and the human aspect will be highly praised and promoted in the post-digital context.

Methodology

Aimed at providing a structured overview of the audience-oriented initiatives and strategies, this research is based on a qualitative thematic analysis of relevant online resources and newspaper articles.

To describe trends in communication and to trace the development of scholarship (Krippendorff & Klaus, 2004: 45), the online version of The Arts Newspaper (<https://www.theartnewspaper.com/>) has been chosen as a reliable source of information, recognized, and supported by the key actors of the art world. Among reviewers and commentators for the paper are museum directors, curators, artists, and art critics (The Art Newspaper: About, accessed: 2021, May 15), which provides an opportunity to make a reliable overview of their vision, opinion, and predictions. Additionally, a few articles from other online sources: Artnet (<http://www.artnet.com/>) and DataArt (<https://www.dataart.com/>), have been added to confirm certain theories and trends.

A pre-selection criterion based on the timeframe (01/03/2020 – 31/05/2021) and search by the keywords combination 'Art Fair'+ 'Covid' helped to identify 34 relevant articles, which contained reflections and interviews on the dynamics in the art fairs' industry, changes, and initiatives.

After the first revision, articles that contained irrelevant information have been eliminated. To answer the question: "What audience-oriented strategies and activities were implemented by the art fairs during confinement and which of them are more likely to be used in the future?", inductive coding was implemented. Instead of assigning the pre-selected categories, they were formed naturally during the content screening. Following Gioia's approach to inductive research designed to develop new concepts and to generate persuasive new theories (Gioia & Pitre, 1990; Gioia et al., 2012), these initiatives were later grouped in the second-order themes.

Interestingly, after grouping of categories, it has been observed that they generally correspond to the key strategic areas of audience development identified by the EngageAudiences Project (Bollo et al., 2017).

Additional qualitative analysis in its explanatory nature helped to make predictions on the trends that most likely will remain in the art fair's industry in the post-covid context.

Art Fairs in Confinement: Strategies, Activities, and Ways of Engagement with the Audience

Starting from the cancellation of Art Basel Hong Kong in March 2020, major art fairs started to cancel their events, due to the pandemic (Art Market Report 2021; Brady, 2020, Schneider, 2020, March 16; Artnet News, 2020, March 16).

According to the Art Market report 2021, 61% of global art fairs planned for 2020 were canceled, and only 37% managed to have live events, although in a restricted format and with rescheduled dates. The remaining 2% of fairs were held in an alternative way, such as a smaller, modified live event, a hybrid art fair, appointment-only fair in another venue, or some other decentralized event held across different locations within a city or internationally.

Although organizers of the events were trying to implement creative and non-standard solutions, the research has shown that most of those initiatives were rather similar in nature. The table below presents all the first-order categories and second-order themes that have been formed out of these categories. Representative quotations serve to illustrate the raw material, out of which the categories were identified. The most frequently identified themes are further discussed in detail.

First-Order Categories	Second-Order Themes	Representative quotations
Online Viewing Rooms (OVR)	Digital Transformation	"Although the circumstances are quite exceptional today, it can be a rewarding experience, a kind of testing ground for analyzing how digital technology can be successful in the art market. Online platforms could provide an additional channel of audience engagement for fairs and art galleries in the future". (Pablo del Val, Art Dubai art director) "At least 75% of the conversations we are having right now are brainstorming about how best to present art online". (Sam Orlofsky, [former] director of Gagosian Gallery)
New technologies: VR, AR	Digital Transformation	"What is absent from current online fair platforms is the 'element of discovery' that wandering the aisles of a physical event engenders. The 'experience factor' is what makes fairs fun and, using video game technology, Untitled, Art Online visitors will be able to browse booths leisurely, or jump directly to where they want to go on the floor plan, rather than just clicking through a couple of static pages". (Jeffrey Lawson, Untitled, Art Fair's founder)

Other online initiatives	Digital Transformation	"Still, my favourite digital solution so far has been more old-school: an easy-to-navigate, searchable PDF catalogue for April's Artmonte-carlo fair. It came complete with breaks to get you away from your screen, along with links to a classical music concert and a recipe for a grapefruit and asparagus starter, courtesy of a three-Michelin-star chef. Some welcome reminders of the joys of IRL". (Melanie Gerlis, Art Market editor of The Art Newspaper)
Online side events: conferences, talks, performances	Digital Transformation	"Art Basel webinar was devoted to New Gallery Collaborations During the Crisis. On the Zoom panel were David Zwirner (in his Montauk bedroom), Sadie Coles (with guest appearances from her son and cat) and Jeffrey Deitch (and his bookshelf), moderated by Art Basel's global director Marc Spiegler". (Louisa Buck, British art critic)
Adaptation of the artworks to a digital context	Digital Transformation	"In the absence of the flesh-pressing, glass-clinking fervour of real-life art fairs, many artists are embracing the seclusion of lockdown and readily adapting to the art world's newfound digital status, creating works specifically with virtual fairs and online viewing rooms in mind". (Anny Shaw, art journalist for The Art Newspaper)
De-centralization: gallery weekends, different small locations around the city	Place	"By concentrating on just a few days, gallery weekends can recreate the excitement and buzz of an art fair. The increased footfall gives the feeling of a popular event, better than the experience of visiting an exhibition alone, in an echoing white space. Meeting up with like-minded people and discussing what is on also reinforces the event's interest and relevance". (Georgina Adam, journalist, public speaker, art market expert)
New location specifically built for the purpose	Place	"We have done some very aggressive modelling on the basis of only having 300 people in there, but it could be more. In terms of capacity, we will work with whatever limit is imposed at that time". (Michael Benson, Photo London's co-founder)
Longer duration of the art fairs	Time	"The extensive length of the event [NADA Fair] —four weeks — also offers dealers ample time to make sales ...". (Margaret Carrigan, Deputy Art Market Editor at The Art Newspaper)
All-year-long events	Time	"In June 2020 Design Miami/ announced Design Miami/ Shop after it was forced to cancel its already-postponed Basel edition, which will be accessible 365 days a year and is open to galleries who have exhibited with the fair previously". (Margaret Carrigan, Deputy Art Market Editor at The Art Newspaper)

Smaller events for local audience	Community Engagement	"I don't think fairs are going away any time soon, but I don't know how many people will be traveling for fairs soon. Post-pandemic, I think we'll see the cultural landscape become much more spread out across the US, away from the major international cities, and I think buyers will embrace localism". (Margaret Carrigan, Deputy Art Market Editor at The Art Newspaper)
Focus on local galleries	Community Engagement	"This online initiative launches today with 81 of the city's galleries large and small, emerging and established, joining together to promote engagement with a local and international art audience. Every week there is a rotating presentation of ten gallery platforms along with one curated project, with each gallery appearing on the platform once every eight weeks. There's also an archive section devoted to LA's rich gallery history, with Deitch stressing that the platform is not exclusive but open to "every serious gallery in the city." (Louisa Buck, British art critic)
Collaboration with technological companies	Collaboration and Partnership	"The event [NADA Fair] is produced in partnership with the art-focused technology company Artlogic, which is donating its online viewing room platform for Nada's use". (Margaret Carrigan, Deputy Art Market Editor at The Art Newspaper)
Collaboration with online Marketplace platforms	Collaboration and Partnership	"As part of its #ArtKeepsGoing initiative, Artsy has also launched separate collections of works dedicated to non-profit institutions and others focused on galleries and artists that were due to show at art fairs that have been cancelled or postponed, such as ArteBA. It will also host some MFA graduate shows". (Gabiella Angeletti, art journalist for The Art Newspaper)
Collaborative Support Model	Collaboration and Partnership	"FAIR is NADA's response to the current situation, in line with our commitment to supporting a global community of galleries and artists. While many of these art spaces have been temporarily closed to the public, this new model provides an opportunity to showcase the best of contemporary art, while demonstrating our collaborative spirit and fostering mutual support for one another". (Heather Hubbs, NADA executive director)

TABLE 1. AUDIENCE DEVELOPMENT STRATEGIES AND ACTIVITIES OF THE ART FAIRS DURING THE CONFINEMENT

Source: Authors' own elaboration.

Interestingly, five themes that emerged from the thematic analysis broadly correspond with the strategic areas of intervention for audience development, elaborated by Bollo et al. (2017). Thus, digital transformation, change of place, collaboration and partnership became functional solutions for the art fairs in times of crisis. However, it is important to mention that categories within each theme can be varied, and don't imply the same approach for all the cultural events. Thus, in the present case, digital transformation included the implementation of new technologies, such as virtual and augmented reality, the development of online viewing rooms and alternative ways to present the program online; organization of online side and educational events, such as webinars, talks, and presentations, as well as adaptation of these artworks to a digital context. The need for a change of usual locations was justified above all by the covid restrictions. In some cases, external highly ventilated pavilions were built to fulfill the sanitary requirements and to be able to host an appropriate number of visitors. Another solution was the organization of de-centered events around the city (ZONAMACO in Mexico City) or even around the region (CHART 2020, that simultaneously took place in Copenhagen, Helsinki, Oslo, Reykjavik, and Stockholm).

Additionally, Borwick's (2012) idea of creating communities instead of audiences, and general focus on the local communities has found its way in a community engagement, promoted by the art fairs' organizers during the times when international travel was restricted.

Finally, based on the tendency of changing the usual duration of the Art Fairs from five days/one week to longer, sometimes "all-year-round" events have emerged into the category of "Time", giving more options to the visitors and participants. This option was successfully implemented especially in the online format. Instead of short-term exhibitions, art fairs offered different options and time slots to the visitors.

The analysis shows that not all the identified strategies have had the same impact on the art fairs' industry. Thus, only the most representative examples are discussed in detail.

Digital Transformation

In general, the process of digitization and digital transformation can be explained through the digital organizational forms, digital infrastructure, and digital activities which increase productivity and growth or generate a competitive advantage for the organization

(Brynjolfsson & McAfee, 2013; Ancarani & Di Mauro, 2018; Hinings et al., 2018; Svahn et al., 2017).

Before 2020, a big part of the art fairs did not pay enough attention to their digital strategies. The need to engage with the audience and exhibitors during the times of confinement has unsurprisingly turned them in a way to digital transformation. According to the engagement manager of DataArt, Doron Fagelson (2020) this development directly reflected the slow trend that had been noticed even before the COVID-19 pandemic: the digital transformation of the art trade in general.

Besides the goal to get commercial viability, they faced a serious challenge - to craft a virtual experience in such a way that it can be engaging and socially stimulating, although this experience is incomparable to social interactions and dynamics in real life.

The discourse on the importance of rapid digital transformation was especially widespread among the gallery directors. Sam Orlofsky, [at that moment] director of Gagosian Gallery claimed that starting from March 2020 majority of the conversations were brainstorming on what was the best way to present art online (Orlofsky cited in Gerlis, 2020, May 5). At the same time, the director of the homonymous gallery, Thaddaeus Ropac, was initially not in favor of "going online" (Ropac cited in Gerlis, 2020, May 5), thinking it could be distractive. However, launching their Online Viewing Room, he managed to embrace it, claiming to have hundreds of people engaged from the first day (Ropac cited by Gerlis, 2020, May 5).

Online Viewing Rooms (OVRs) were probably the most widespread format for online art fairs. According to the art portal Munchies Art Club, they provide an exclusive look at the work of an artist in a three-dimensional setting; they are globally accessible allowing the art dealers and artists to present their works to a large number of collectors and art lovers.

Unlike many other fairs, Art Basel has had a long way towards digital transformation, launching its first website back in 1995 (Bodick, 2014, June 17). They also have been among the first ones to launch an online alternative to their fair, when the spring edition of Art Basel Hong Kong got canceled. Although it provided visibility to the galleries and artists and guaranteed free access to the wider audience, the marketplace-like display suggested that it was a commercial, rather than a cultural experience. The abundance of the content represented there was initially not curated and was too numerous and exhausting to an unprepared uneducated audience. However, despite the evident

disadvantages, the format was quickly appropriated by the majority of the international art fairs, including Frieze, Artissima, FIAC, and others (Carrigan, 2020, March 31).

Acknowledging the not visitor-friendly format of the OVRs, some of the fairs developed more innovative digital initiatives, using, for example, Virtual or Augmented Reality. To better the user experience, Miami-based fair Untitled.art has launched an online edition using VR technology. According to official communication (Untitled.art, 2020), a platform used video game technology to imitate the IRL art-fair feel of the art fair's aisles. Claiming that the majority of the online art fairs were lacking an "element of discovery" and the "experience factor", the fair's founder, Jeffrey Lawson said that visitors of the Untitled.art VR would be able to browse booths leisurely or jump directly to where they want to go on the floor plan, "rather than just clicking through a couple of static pages" (cited in Carrigan, 2020, May 15).

Additionally, digital format was used to substitute a wide range of side events and activities, typically running together with the fairs. Starting from zoom webinars and panel talks, continuing with specifically made videos about artists, online performances, and increased engagement through social media. (UBS Art Market Report 2021).

Community Engagement

Although lately the key idea behind the art fairs was to provide international visibility and to foster globalization of art galleries (Quemin, 2008), during the times when borders remained closed and international traveling became a difficult challenge, art fairs' organizers have focused their interest on local galleries and audiences. According to the director of Art Cologne, Daniel Hug (2020, May 18), precisely "local" galleries and collectors from the surrounding regions can help the art market to survive. This idea is shared by the director of the Dallas Art Fair, Kelly Cornell: reflecting on the potential future of the fair and collectors/audience, she believes they would "embrace localism" (cited in Carrigan, 2020, July 9).

To prove it, in July 2020 Dallas Art Fair had launched Culture Place, Inc., a permanently working website that hosted a rotating group of 44 Texas-based galleries, to provide them visibility and to encourage a local audience to buy from local galleries. (Carrigan, 2020, July 9).

Not only localism became the priority of

established art fairs, but it also has encouraged the development of totally new projects. Thus, the Hong Kong Art Gallery Association had launched a small local art fair, *Unscheduled*, featuring 12 local galleries (Movius, 2020, July 1). Despite the small dimension of this event and impossibility to bring an international audience, participating galleries remained extremely satisfied, claiming that they have met new audience and potential collectors at the fair (Arman Lam, the director of Hanart TZ Gallery; Katie de Tilly, the 10 Chancery Lane Gallery owner; Willem Molesworth, director of de Sarthe Gallery Hong Kong, all cited in Movius, 2020, July 1). This can be logically explained by two main reasons: first, the inability to travel to big international fairs, as well as their cancellation, has encouraged big collectors to pay attention to the local initiatives and events around them, typically ignored due to the lack of time and oversaturation of the cultural agenda. Second, the same limit of cultural offer has encouraged non-attendees to explore a new type of cultural events, coming to the art fairs for the first time.

Collaboration and Partnership

It is evident that during crisis times, it is important to join forces and to work cooperatively and collaboratively. In the case of the art fairs, it is possible to witness some major directions of collaboration and partnerships developed in the past year.

First, in the need for digital transformation, a significant part of the art fairs has created their online platforms in partnership with technology companies and startups. Among the most representative examples is the VR platform of the Untitled.art developed in collaboration with the Danish art-and-tech startup Artland (Carrigan, 2020, May 15). Another art-focused technology company, Artlogic, has been working in partnership with NADA Fair to develop a custom-made online viewing room platform. It is interesting that in this case, the company has donated the platform to the exclusive use of the fair to contribute to its visibility online (Carrigan, 2020, May 14).

Artlogic was not the only company that decided to help the art fairs. As part of its #ArtKeepsGoing initiative, the online art marketplace platform Artsy has launched separate collections of works dedicated to shows and art fairs that had been canceled or postponed, helping to introduce their program to wider audiences.

In a less-evident way, a tendency for collaboration can be noticed among the clusters of the galleries, participating in the art fairs. Thus, organizing

a gallery week, as an alternative to ZONAMACO fair in Mexico-city, its founder, Zelika García has emphasized the importance of a "spirit of collaboration and strengthening of the connections with collectors, professionals and the general public" (cited in Cassady, 2021, April 27). In the programming of the gallery week, a partnership among the galleries became a central theme, presenting programs of emerging galleries in the spaces of well-established ones and fostering joint exhibition projects and collaboration. Among other benefits, this initiative has helped to diversify the audience, bringing new visitors, especially from the local communities, to re-invented exhibition spaces.

Despite the relative success of these initiatives during the period of crisis, it remains questionable whether they represent temporary solutions, or can be perceived as "good practices". Although the need for the new art fair's model has been actively discussed, it is difficult to change a long-established concept with a long historical tradition.

Searching for a Model of the Art Fair of the Future

Starting from the times of confinement and cancellation of the cultural events, through the period of lightweight precaution measures, the art fairs' organizers have been trying to reinvent a model of the art fair functionally. Although a time of crisis was fruitful for creative solutions, it is possible to predict now that not all the proposed initiatives will remain in the post-covid future. A deeper analysis of the opinion of the key artworld's players, supported by reviews and commentary provided at the panel talks, and evidence of the experience from the art fairs held in the second half of 2021, helps to make predictions on what trends are more likely to continue their development in the future.

It is interesting to confront these audience development tendencies with the key points of the audience behavior and trends survey conducted in June 2021 by the Audience Agency. According to it:

- Audiences are slowly showing the will to return, with a continuing sense of risk to health and only slow rises in engagement.
- There are already indications that audience behavior will be different in the 'new-normal' after the pandemic, particularly in relation to more local attendance, greater digital engagement (alongside, and in some cases replacing, live

attendance), and openness to changes in event formats from significant minorities of the population (The Audience Agency, 2021).

In terms of the art fairs, similar behavioral patterns, that can predict future trends, can be noticed. Acknowledging travel difficulties, both art fair organizers and participating galleries acknowledge the importance of community engagement and localization of their initiatives. This does not apply, however, to the choice of the exhibiting artists. On the contrary, the idea behind it is to provide the platform to the local galleries, to show their international offer of the artists to the local audiences. It is diversification of the exhibition program that can help to attract local audiences that previously were not interested to attend the events.

Despite the short-term existence of the online art fairs, this experience was enough for the audience to proclaim a "digital fairtigue" (Gerlis, 2020, June 15), caused by oversaturation with online activities. It became a popular topic at the dedicated webinars and panel talks. Market observer and dealer Josh Baer has even posted a #sorrynotsorry statement on his newsletter: "I apologize—I looked at no-one's online viewing rooms" (cited in Gerlis, 2020, June 15), which can serve as an illustration of the art world's attitude towards the growing number of online art fairs and exhibitions. One year later, at the panel talk "Art Fairs in the Times of Change", held during the ARCOMadrid 2021, director of the art fair Artissima, Ilaria Bonacossa, raised a question of outdated and "not-user-friendly" display of most of the online fairs, suggesting that it is something that needs to be improved in the future. It shouldn't be forgotten that contemporary art fairs are widely based on the "experience nature" (Barragan, 2008: 67), which is impossible to recreate online.

It seems logical, that finding themselves in a post-digital context, art fairs' organizers should focus on the in-real-life activities and human interaction as an essential part of the art trade experience greatly missed by the audience. Art journalist Georgina Adam (2020, April 1) suggested that a break from the fairs and reduction in their number would be beneficial in terms of the visitors' numbers: "after a long break, collectors finally will be looking forward to attending, instead of complaining about fairtigue". Press releases of the major art fairs of 2021 (ARCO, Art Basel, FIAC, Art Basel Miami Beach) have shown that indeed, after a long absence, people are coming back to the fairs and reports show a steady growing number of visitors. However, it is too early to proclaim the full recovery, as the number of

visitors is still far from the pre-covid times. A significant reduction in the number of international visitors is especially noticeable. Thus, despite the global nature of the art fairs, focusing on the local communities and local public may be a long-term priority and a way to reinvent their model. Perhaps in the current conditions, it is more relevant to talk about glocalization (Roudometof, 2016) rather than globalization of the art fairs.

However, it is also evident that digitization of the art fairs will continue. According to the Art Market Report 2021, digital initiatives appear to have had a lasting impact on plans, with dealers planning to exhibit at least one OVR in the following years. Undoubtedly, online fairs provide an additional channel of audience engagement and make access to them easier and more convenient. Thus, even when it became possible to organize in-real-life events, most of the art fairs have been held in a hybrid virtual and physical form. This provides choice to both galleries and audience, to participate only online, in-real-life, or in both forms, and helps to diversify the audience. Additionally, online art fairs can serve as a supplement to the live events, giving the audience a chance to get access to additional information. Thus the latest hybrid art fairs of 2021 have witnessed an increase of new young entrants, joining the art fairs online and buying the artworks for the first time (Gerlis, 2021, November 8).

Conclusions

The spread of Covid-19 and all the sequences that followed has greatly damaged the cultural industry in general and the art fairs' industry in particular. The need for the art fairs to reinvent their audience development strategies applicable to the new circumstances became crucial not only for the event organizers but also for many representatives of the artworld. Although, at the first glance it may seem, that the fairs were developing unique creative solutions for their events, a closer thematic analysis helped to establish five strategic areas, around which these initiatives were developing, namely digital transformation, place, time, community engagement, collaboration and partnership.

However, not all these initiatives have had the same degree of success among the audience and exhibitors. It is important to remember, that art fairs have always attracted a wider audience for their "experience" nature (Barragan, 2008) and social aspect (Thornton, 2009), providing opportunities for networking and social interaction. Therefore, it is impossible to base their audience development strategies exclusively on

innovation and digitalization. In fact, until the last few years, most of the art fairs' organizers had been focused on the development of in-real-life experiences and strategies, rather than the development of digital ones. Although during the lockdowns art fairs had to go online, there is no doubt that the "post-covid" context will continue to be human-oriented for the majority of the fairs, as they are seeking to provide more experience, engagement, and human connection greatly missed during the time of confinement.

Analysis of the opinion of the representatives of the art world, including art journalists, critics, art dealers, and art fair's organizers has shown that the hybrid form of the fair seems to be the most appropriate solution, which embraces the idea of the post-digital context: focus on the human interaction, but at the same time, preservation of the benefits brought by digital transformation.

It is evident that the opportunity to personally see the artworks, interact with galleries and artists, as well as to attend collateral events around the city, cannot be substituted by an online program. However, an online alternative seems very useful, for those who are unable to travel, but still want to participate and possibly even buy the artworks. Through the last two years, the online offer of the art fairs has been developing and now includes personalized virtual tours around the exhibition halls, video calls with the gallerists, and live storytelling on social media aimed at the re-creation of the art fairs' atmosphere at least partially. Adjusting in-real-life programs of the fairs to the needs of local communities, and at the same time diversifying them to be relevant for the international online audience, art fairs are embracing glocalization as the first step to the new art fair's model.

Based on the qualitative thematic analysis of the articles and interviews, this paper has provided a comprehensive overview of the most widespread audience-oriented activities implemented during the lockdowns, selecting digital transformation (especially in its hybrid form), and community engagement will be the focus areas that will be most probably promoted by the art fairs' organizers in the near future. In its turn, it opened a discussion on which of these activities can contribute to the development of the new art fair model, so needed in the industry.

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